

## FY 2004 OTRR Formal Review Guidance for All Participants

### 1. Purpose

Every project which undergoes OTRR testing will also undergo OTRR formal review. Formal reviews are usually held at the program office in Arlington, Virginia.

The OTRR formal review is the venue at which the test results and CTA/Portfolio Leader's evaluation are presented to the SAS PM. The SAS PM chairs the review, aided by the CTA/Portfolio Leader and other external reviewers invited at the SAS PM's discretion. The formal review provides the SAS PM with a current overview of the project as well as the results of the OTRR test event(s) and CTA/Portfolio Leader's evaluation. It gives the SAS PM an opportunity to meet with the CTA/Portfolio Leader, the Project Principal Investigator and the OTRR tester(s) to thoroughly understand the code's final developmental performance level and its performance strengths and weaknesses, and to resolve any questions concerning the conduct of the test event(s).

### 2. Preparation

**Well in advance of the review**, the CTA/Portfolio Leader may review his/her own as well as the Project Principal Investigator's and OTRR tester presentation materials and reports and ensure that they are completed and **revised as necessary in accordance with SAS PM's guidance**. (Materials which are revised should be clearly marked as such.) The CTA/Portfolio Leader will also ensure that the following read-ahead information and documents (in the media specified below) are complete and are received by the SAS PM or his/her staff **three weeks** before the review. All items must be provided in MS Office-compatible media as shown in the far right column of the table.

Please note that hard copy originals of both formal reports should already have been signed and transmitted by mail and the full complement of attachments to the test report should have been received by the SAS PM **in advance of scheduling the formal review**.

Items	Originator	Hard Copy	MS Office- Compatible Electronic Media
Evaluation Report	CTA/Portfolio Leader	x (signed)	MS Word, RTF or PDF
OTRR Test Plan (Approved version used for the test event)	Project Principal Investigator		MS Word, RTF or PDF
OTRR Consolidated Test Report(s) with attachments	Tester(s)	x (signed)	MS Word, RTF or PDF
Test performance data matrix	Tester(s)		MS Excel
Test results	Tester(s)		MS Excel, RTF or PDF
User comments and critiques	Tester(s)		
Presentation materials (viewgraph content and format below)	Beta tester(s)		MS PowerPoint
Presentation materials (viewgraph content and format below)	CTA/Portfolio Leader and Project Principal Investigator		MS PowerPoint
User comments and critiques (if available)	CTA/Portfolio Leader and Project Principal Investigator	x	MS Word, RTF or PDF
User and installation manuals and other pertinent <i>technical</i> documentation	Project Principal Investigator		MS Word, RTF or PDF
Examples of representative code front-end(s), input and output, validation scripts, etc.	Project Principal Investigator	x	RTF or PDF
Other project <i>management</i> plans (if applicable)	Project Principal Investigator	x	Word, RTF or PDF

### 3. Attire

Business attire is expected for this review.

#### 4. OTRR Formal Review Presentation Format and Order of Events

The project team will provide an OTRR review presentation to the SAS PM. This oral briefing and accompanying viewgraphs will consist of the subject areas and sequence shown in the table below. Time limits shown are approximations. The project overview should take no longer than 20 minutes.

Presentation Category	Time Limit	Information to be Presented	Presenter
Introductions	10 minutes	Not applicable	CTA/Portfolio Leader and SAS PM
Project Overview	30 minutes	<ul style="list-style-type: none"> <li>- Provide the project technical goals.</li> <li>- Provide the project successes and current or expected impact on DoD's mission.</li> <li>- Identify all users of the current version of the CHSSI software (include organization, phone number, email address on viewgraphs).</li> </ul>	Project Principal Investigator
Test Results	30 minutes	<ul style="list-style-type: none"> <li>- Present any deviations from the test plan</li> <li>- Present test results for all targeted platforms, each CTP and remaining items of the test report.</li> <li>- Discuss the MS Excel matrix of test results.</li> <li>- Discuss any pertinent test issues.</li> <li>- any pertinent test issues,</li> <li>- Describe the utility and impact of the software for the user community, and</li> <li>- Appraise the user manuals, other instructional materials and error reporting/fixing system.</li> </ul>	"Elected" Tester
Programmatic and Other Issues	30 minutes	<ul style="list-style-type: none"> <li>- Identify any technical and managerial impediments to the project.</li> <li>- Describe how PET has impacted the project.</li> <li>- Address plans to sustain software after CHSSI.</li> <li>- Discuss intellectual property rights issues and any security or export control issues with respect to software.</li> <li>- Describe the software release policy and show where it is published.</li> <li>- Present the project's user interface(s) (e.g., newsletters, web page, and the like)</li> <li>- Describe plans to introduce the software to the user community; plans to identify new users; plans to provide user support</li> <li>- Identify any lessons learned.</li> </ul>	Project Principal Investigator
CTA/Portfolio Leader Evaluation and Summary	10 minutes	<ul style="list-style-type: none"> <li>- Provide a summary of the evaluation report and a summary of the state of the project and its impact upon the DoD.</li> <li>- Identify any lessons learned.</li> </ul>	CTA/Portfolio Leader

## **5. Discussion of Review Findings**

The SAS PM and the CTA/Portfolio Leader will caucus to discuss the findings of the review. The Project Principal Investigator and the tester(s) may be requested to provide further details during these discussions.

## **6. SAS PM Feedback**

Typically, oral feedback will be provided after the caucus and formal written feedback will be sent at a later date. The SAS PM will provide a written document summarizing the OTRR results and detailing any recommended corrective action(s). This feedback will be sent to the CTA/Portfolio Leader who will be responsible for communicating results of the test to the Project Principal Investigator.

The SAS PM will provide or withhold certification of readiness for operational testing based upon the OTRR.

Participation in and results of the OTRR will be noted in past performance evaluations for new proposals.